# READY TO TAKE YOUR ROBOT HOME?

## What people want from humanoid robots – and what they don't.

**FIELD STUDY: IFA BERLIN 2026**

**30**
completed questionnaires

**~40**
people from four countries

**5**
questions & many perspectives

**1**
question that reveals more than all the others

FOREWORD

# WHAT HAPPENS WHEN THE APPLAUSE IS OVER?

At IFA 2026 in Berlin, humanoid robots were the talk of the trade fair. They danced, boxed and waved at stand after stand, while crowds gathered in front of them, phones held high.

So we asked: **"If I gave you a humanoid robot right now as a present, would you take it home?"** Add a questionnaire with five more questions, a pen and an open ear.

The result: 30 completed questionnaires from around 40 people from four countries. Not a representative study, but a snapshot from the trade fair. Despite the small base, patterns emerge that we find exciting.

The short version: many said "Yes, but …". It was the **but** that we found most revealing. It hints at where people would let new technology into their lives – and where they probably wouldn't.

This white paper sums up what we learned by asking and listening. And what, in our view, it could mean for communication. For robotics, but also beyond. Because the question of when people trust a new technology is coming up everywhere right now: with AI assistants, in the smart home, in care.

The topic is only just beginning. We'll stay on it and watch how robots gradually move into our everyday lives.

Enjoy exploring!

YOUR TEAM AT TINKERBELLE

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## WHO IS THIS FOR?

For agencies, communication and marketing teams, and anyone who wants to explain, sell or bring new technology into everyday life.

And for anyone who simply wants to know what people at a tech fair say when you ask them an honest question.

AT A GLANCE

# THE STUDY IN NUMBERS

**Two days at the fair, one questionnaire, many conversations. That is the basis of this white paper.**

### FACT SHEET

**Place and time**
IFA Berlin, 4 and 7 September 2026

**Method**
Short interviews on the exhibition floor using a two-page questionnaire (five questions), conducted by two interviewers. Conversation notes recorded as voice memos straight afterwards.

**Sample**
30 questionnaires, around 40 people. Groups filled in one questionnaire together.

**Origin**
Germany (majority), United Kingdom, Spain, China (incl. Hong Kong)

**Age**
from about 10 to over 60

**Who**
Trade visitors and exhibitors from retail, industry, software, IT, robotics, advertising, design, catering, home appliances and energy technology

**Character**
qualitative, exploratory, not representative

## 9 of 15*

would take the robot home – but draw lines while doing so.

## 22 of 30

would trust it in the role of household helper. Only six as a friend.

## 2 of 30

react anxiously to the idea of a robot doing their job better than them.

## 12

conversations name children as a line not to cross. The most frequently mentioned taboo in our sample.

* "9 of 15" refers to the 15 guided conversations that included the opening question. All other figures refer to all 30 questionnaires; multiple answers possible. More on page 6.

# THE FIVE KEY FINDINGS

## 01 UNEASY FEELINGS – BECAUSE OF THE LOOKS.

A human-like face, human size, simulated closeness: these tend to put people off. Less so what the robot can actually do.

## 02 WHEN THE WOW EFFECT UNSETTLES.

Dancing and boxing robots tended to make our respondents uneasy rather than excited. Even exhibitors say so.

## 03 WELCOME AS A HELPER, HARDLY AS A COMPANION.

What makes life easier is more likely to be accepted. As a replacement for people, many reject it. Looking ahead to 2036, most wished for less housework; nobody mentioned more company.

## 04 MOST PEOPLE DRAW THE LINE AT CHILDREN.

No taboo was mentioned more often. Two questions meet here: appearance and replacing people.

## 05 WHAT'S LEFT OF MY WORK – AND OF MY SALARY?

Hardly anyone voiced fear of losing their job. What seemed to matter more was income and the part of the work that feels human.

THE BOTTOM LINE

**Our impression: people want people. Robots may help – preferably in the background.**

A promise like **"Your life gets easier"** fits what we heard better than "You'll never be alone again".

HOW WE ASKED

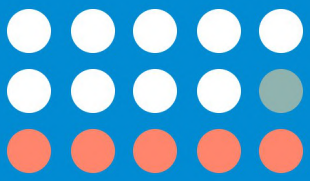
# A LOOK AT OUR QUESTIONNAIRE

These are the questions we took to visitors and exhibitors.

THE OPENING QUESTION · SPOKEN, ONLY IN THE 15 FACE-TO-FACE CONVERSATIONS

## "If I gave you a humanoid robot right now as a present, would you take it home?"

We opened every conversation with this question. The most interesting answers came later in the conversation, once people started to differentiate.



**Answers from 15 conversations:**
**9 yes · 1 undecided · 5 no**

**01** **Imagine: tomorrow, you receive a humanoid robot as a gift. What should it do first for you?**

Open question

**02** **Which role would you trust a robot with in your life?**

Answer options: Colleague · Household helper · Caregiver · Sales assistant · Teacher · Friend · None of these

**03** **A robot makes your job better than you. What's your first thought?**

Answer options: Finally! · Uncanny. · I'll make it do something boring · What happens to me then? · I'll believe it when I see it.

**04** **What should your humanoid robot NEVER do?**

Open question

**05** **Let's fast-forward to 2036. Humanoid robots are completely normal. Complete the sentence: "How amazing that in 2026 we still …"**

Open question

The questionnaire was available in German and English (English title: "Ready to take your robot home?"). Shown here is the English version.

HOW WE ASKED

# WHAT THIS DATA CAN – AND CAN'T – TELL US

**We collected the data ourselves, listened and took notes. So that the results can be put into context properly, we are open about how they came about.**

PART A · QUESTIONNAIRES 01–15

### CONVERSATIONS WE CONDUCTED

Conducted in person, with targeted follow-up questions. Voice notes recorded straight afterwards capture the reasoning. These conversations include the opening question, context on the person, original quotes and the reasons behind the answers.

PART B · QUESTIONNAIRES 16–30

### SELF-COMPLETED QUESTIONNAIRES

Collected by our interviewers. Only the questionnaire, without the opening question or follow-ups, without personal details, just the industry. The open answers are still revealing, especially for questions 4 and 5.

## THE LIMITS

- **Small base:** 30 questionnaires do not allow generalisation. We read the results as hints and tendencies from a snapshot, not as proof.
- **Convenience sample at a tech fair:** people who go to IFA are interested in technology. The scepticism we heard is therefore more likely a floor than a ceiling.
- **Self-interest:** several respondents were exhibitors. Two talked more about their own product than about humanoid robots.
- **Groups:** couples, families and teams filled in one questionnaire together, sometimes with differing answers.

## HOW WE READ THE NUMBERS

All figures are absolute values, for example "22 of 30 questionnaires". We avoid percentages because, with a sample this small, they suggest a precision that simply isn't there.

A tick is quickly made. A spoken "yes", on the other hand, often leads to a follow-up question. That is why we see the ticks as the upper limit of agreement. What people actually mean becomes visible in the conversations.

Quotes from German-language conversations have been translated into English; where people spoke English, we use their own words. All respondents remain anonymous; we do not name companies. Where we interpret, we say so.

**WHO WE MET**

Two trainees from electronics retail · a production CEO from Hong Kong · an employee of a large communications agency · a member of the HR team at a robotics company · three software developers from the UK · a German teacher and her partner · two brothers from Madrid with an AI focus · a family with a ten-year-old son · an AI enthusiast in his sixties · exhibitors for exoskeletons, AI toys, robotics, home appliances and energy technology · someone from the trade fair catering

INSIGHT 01 OF 05

# UNEASY FEELINGS – BECAUSE OF THE LOOKS.

01

**Our conversations were rarely about what a robot can do. Far more often, they were about what it looks like.**

Appearance came up again and again, often without being asked. And the points people found off-putting were similar: a human-like face, human size and, above all, the attempt to seem human.

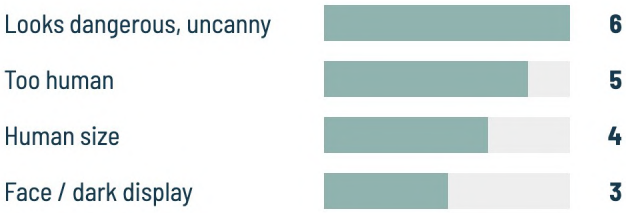
An employee of a large communications agency puts it this way: humanoid robots **fake being human.** A young couple from Germany simply finds the dark, empty display face "creepy". Three colleagues from product management are bothered by robots learning facial expressions and gestures perfectly – because then they would be impossible to tell apart.

Two households independently came up with the same two-point spec: **No black display face.** Five respondents suggest the same solution: cute, playful, funny. More toy than mirror image.

In our snapshot, this was the most frequently mentioned point of substance. It runs rather counter to what is currently on show at trade fairs: machines of human size and human shape.

### WHAT BOTHERS PEOPLE – UNPROMPTED

Number of conversations




## "Become a copy of me."

EXHIBITOR, ENERGY SYSTEMS, ASKED WHAT HER OWN ROBOT MUST NEVER DO

A few words that sum up a lot: the worry seems to be less that the robot can do too little, and more that it becomes too much like us.

WHAT THIS MEANS FOR COMMUNICATION:

**The more human a robot seems, the more unsettling it is for us humans – fascinating some and leaving others with an uneasy feeling.**

INSIGHT 02 OF 05

02

# WHEN THE WOW EFFECT UNSETTLES.

**Dancing and boxing robots are meant to impress. For some of our respondents, they were more unsettling than inspiring.**

The clearest criticism came from the fair itself. An exhibitor from the exoskeleton industry thinks the current direction is wrong. What's on show are robots that dance and box. No emotional connection, no recognisable benefit. **Big, combative and silent** – that is exactly what makes them uncanny. She would rather see robots that talk.

Two exhibitors from a maker of AI toys see the cause in films and the media: for decades, robots were the bad guys who rise up against us. And an agency employee is professionally annoyed when brands fake humanity.

Two of the three critics are exhibitors themselves. They are criticising how their own industry presents itself – from the inside.

The counter-check is interesting. Those who want to see what a robot can do don't want an acrobatics show. What seems to be in demand is **proof of usefulness** rather than spectacle.

> **"Robots that dance and box – that's the wrong direction."**
>
> EXHIBITOR, EXOSKELETONS

> **"It does a demo, everything it can do."**
>
> VISITOR, IT – THE ROBOT'S FIRST TASK

> **"We want to change the prejudice that robots are evil."**
>
> EXHIBITOR, AI COMPANIONS FOR CHILDREN

WHAT THIS MEANS FOR COMMUNICATION:

**Amazement alone doesn't seem to build trust. Glimpses of everyday use could achieve more than acrobatics.**

INSIGHT 03 OF 05

# WELCOME AS A HELPER, HARDLY AS A COMPANION.

03

**Washing, dishes, cleaning: yes, please. When it came to friendship, selling and human closeness, most people held back.**

The question about the first task produced a fairly consistent picture. Across countries, industries and age groups, **cleaning** comes out on top. Then laundry, loading and unloading the dishwasher, vacuuming, cooking, tidying up. A robot, it seems, should above all take over what nobody likes doing.

The roles follow the same logic. Household helper appears on 22 of 30 questionnaires. The robot as a friend is mentioned only six times. Sales assistant almost nowhere; several people explained that buying is about relationships. **Care** tended to be accepted in practical form: tablets at the right time, help with walking, relief on the night shift – less so as emotional attention.

### ADD TO, YES. REPLACE, NO.

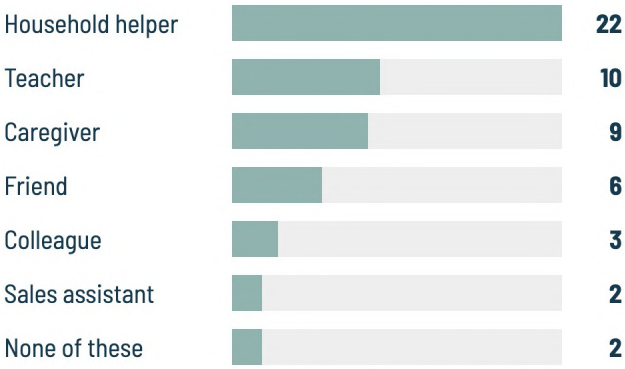
Three colleagues from quality and product management put it most clearly. Their no-go: "social relationship as a replacement". **A robot alongside real people is fine. A robot instead of real people is not.**

For many respondents it seemed to make a big difference whether the robot is **with you** or there **instead of someone**. The first tended to be accepted, the second rejected.

How deep this runs is shown by the question about 2036 (page 12).

### WHICH ROLE WOULD YOU TRUST A ROBOT WITH IN YOUR LIFE?

Number of questionnaires, n = 30, multiple answers possible




Why Teacher ranks so high here is explained on page 6 and in Insight 04.

> **"People always buy from people."**
>
> EXHIBITOR, MANAGEMENT

WHAT THIS MEANS FOR COMMUNICATION:

**In our snapshot, the robot was easy to imagine as a quiet helper – hardly as a companion.**

INSIGHT 04 OF 05

# MOST PEOPLE DRAW THE LINE AT CHILDREN.

04

**Twelve conversations name children as a limit – more often than any other topic. Two questions seem to meet here: appearance and replacing people.**

**NO. ON PRINCIPLE.**

No babysitting, no putting to bed, no childcare.

**10 ANSWERS**

**YES, WITH SUPERVISION.**

Conceivable, but never alone with children.

**1 ANSWER**

**YES, IF IT DOESN'T LOOK HUMAN.**

Fine as a toy. Not as a copy of a human.

**1 ANSWER**

The disagreement is less about children than about another question: **Does design change what a robot is allowed to do?** A talking toy and a humanoid teacher end up in completely different boxes.

A family from Germany makes the most precise argument. Children learn facial expressions and social behaviour by looking real people in the face. A robot has no face. How is a child supposed to learn emotions from it?

Their son, about ten years old, was the only child in our sample. Asked whether he would like a robot as a friend, he says: **No.** What matters to him are real friends he can do things with.

In the role question, 10 questionnaires do tick "Teacher", most of them without a conversation. Where we asked further, there was almost always a caveat: "only under supervision", "if it can do it".

## "Children need people."

EXHIBITORS FROM A MAKER OF AI SOFTWARE FOR TALKING TOYS

THE CENTRAL TENSION

On the same day, two manufacturers at the fair were selling AI companions for children aged 5 to 10. Twelve conversations draw the line at children.

**Commercial ambition and the mood among our respondents seem to be far apart here.**

WHAT THIS MEANS FOR COMMUNICATION:

**When it came to children, respondents above all wanted clear limits. Communication should recognise these limits and reservations and respond to them.**

INSIGHT 05 OF 05

# WHAT'S LEFT OF MY WORK – AND OF MY SALARY?

05

**Only 2 of 30 respondents reacted with unease to the idea of a robot doing their job better than them.**

The most common reactions to question 3 are "Finally!", "I'll believe it when I see it" and "I'll do something else". The worry "What happens to me then?" was chosen by just two respondents.

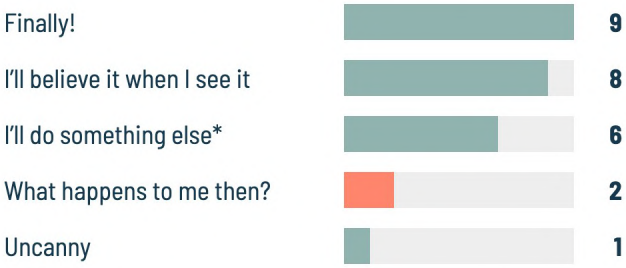
One afterthought stood out when we analysed the answers, appearing three times independently. A CEO from Hong Kong (as a joke), three software developers from the UK and an employee in fashion retail all say essentially the same thing: **Sure – as long as I keep my salary.**

### EVERYONE DEFENDS THEIR OWN CORE

Many would happily hand over the mechanical part of their work. What they defend is rather what they see as their own core:
For an HR employee, that's the personal conversation. For an agency employee, creativity.
For software developers, control over the code.
Those who advise want to keep their empathy.
Those who sell, their personal contact with customers.

### A ROBOT MAKES YOUR JOB BETTER THAN YOU. WHAT'S YOUR FIRST THOUGHT?

Number of questionnaires, multiple answers possible




Six questionnaires without a tick, but with their own words instead. * All six ticks were made on the German questionnaire. The English version offered "I'll make it do something boring" instead – nobody chose it.

> **"Give the job, keep me the salary."**
>
> ENTREPRENEUR FROM HONG KONG, WITH A WINK

WHAT THIS MEANS FOR COMMUNICATION:

**Does human work gain new value as a result – or lose it? And how do we as a society want to deal with robots taking over work?**

STOPOVER 2036

# TIME TRAVEL

Let's fast-forward to 2036. Humanoid robots are completely normal.
**How amazing that in 2026 we still ...**

| | | |
|---|---|---|
| ... had to cook for ourselves. | ... had to go shopping. | ... folded our own laundry. |
| ... cleaned the toilet by hand. | ... did stupid, repetitive work. | ... had to work until 70. |
| ... worried about the skilled-labour shortage. | ... thought we had it under control. | ... found humanoid robots creepy. |

**MANY MENTION HOUSEWORK.
LONELINESS NEVER CAME UP.**

Most of these answers come from questionnaires filled in without follow-up questions – the least guided part of the study. They hint at what people want from the technology: **less effort rather than more company.**

Two answers stand out (in orange). "Thought we had it under control" is the only sceptical vision of the future. And "found humanoid robots creepy" treats today's unease itself as something on its way out.

OUR IMPRESSION AFTER ALL THE CONVERSATIONS

**People want to be with people. What they grant a robot is, above all, efficiency.**

ACROSS ALL INSIGHTS

# WHAT FADES AND WHAT STAYS

**Not every no has to last forever. Some objections could resolve themselves with better technology and falling prices. One probably won't – at least not quickly.**

If you sort the rejections from our snapshot in autumn 2026, four types emerge. Three of them probably have an expiry date. Those who say "too slow", "too unfamiliar" or "too expensive" today may say "yes" in a few years.

The identity no is different. "It can never be a human" doesn't depend on technology or price. It concerns exactly what Insights 01, 03 and 04 are about: appearance, role, closeness. **Our guess: in the longer run, appearance and role will decide acceptance more than technology and price.**

### TRUST ISN'T GIVEN IN ADVANCE

In our sample, nobody wanted to trust a humanoid from day one. Where acceptance appears, it is tied to a process: watching, testing, "with time", "only under supervision", "I'll believe it when I see it".

### FOUR KINDS OF NO

Figure = number of conversations

**8** **IDENTITY**
"It can never be a human."
HERE TO STAY

**5** **ABILITY**
"Too slow. It can't do it yet."
LIKELY TO FADE WITH BETTER TECHNOLOGY

**1** **PRICE**
"€50,000 for too few functions."
LIKELY TO FADE AS PRICES FALL

**2** **TRUST**
"Watch it first."
LIKELY TO FADE WITH EXPERIENCE

WHAT THIS MEANS FOR COMMUNICATION:

**Technology and price will probably sort themselves out over time. The question of what a robot should be for us, probably not. That is where communication can step in.**

# THE ROBOT OUR RESPONDENTS WISH FOR

**Not a product proposal, but a mirror: this is what a robot might look like that our respondents would be more likely to take home. Our snapshot in autumn 2026.**

### SMALLER THAN US.

Hardly anyone wanted it at eye level.

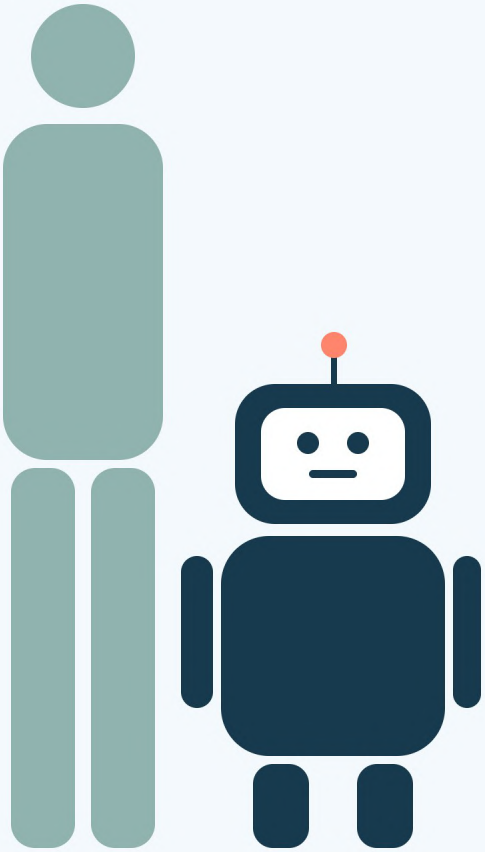


Illustration. Respondents wished for a robot that is smaller than us; no specific height was mentioned. But it seems people tend to feel more in control when interacting with a physically smaller being.

| | |
|---|---|
| **FACE** | No black display. Friendly, but clearly a machine. Not human. |
| **CHARACTER** | Playful rather than serious. It may be a little funny. Important: cute doesn't automatically mean pet. "Not a dog," says one respondent. |
| **TASKS** | Laundry, dishwasher, cleaning the bathroom, vacuuming, watering plants. Outdoors too, such as mowing the lawn. |
| **CARE** | Reminding people to take tablets, helping with walking, relieving the night shift. No faking of affection. |
| **SPEECH** | Disputed. Those who want a tool want silence. Those who want company want conversation. A product that tries to be both unsettles both groups. |
| **TRIAL RUN** | A probation period instead of trust in advance. First the demo, to test all the features. |
| **OFF LIMITS** | Bedroom, wallet, banking, children without supervision. |
| **NEVER** | Attack, fight, eavesdrop, make decisions about my life, be a partner, fake feelings. And: become a copy of me. |

# WHAT THIS MEANS FOR COMMUNICATION

**Seven theses we draw from our snapshot. As food for thought for anyone who wants to bring new technology into everyday life – not as a rulebook.**

### 1 USEFULNESS BEFORE SPECTACLE.

Show the robot folding laundry, not doing a backflip. The wow effect gets attention, but also seems to trigger resistance.

### 2 PROMISE RELIEF, NOT COMPANY.

"Your life gets easier" fits what we heard. "You're never alone" touches exactly the line many people drew.

### 3 SEPARATE "WITH" FROM "INSTEAD OF".

A product that adds to people may enter human contexts. One that replaces them, less so.
Phrases like "your new best friend" or "the perfect babysitter" could quickly backfire.

### 4 DESIGN TRUST AS A PROCESS.

Probation period, test phase, demo at home, clearly named limits. Good communication starts with questions and tries to offer a path to trust instead of assuming it.

### 5 TALK ABOUT INCOME AND IDENTITY SEPARATELY.

Fear of "the future of work" seemed smaller in our sample than expected. Two questions are more concrete: Do I keep my money? Do I keep what makes my work mine?
A field that needs clarity and debate.

### 6 NAME THE NO-GO ZONES YOURSELVES.

Bedroom, wallet, children, data. Communicating limits actively can build credibility. "It doesn't go into the bedroom" is a better promise than any feature.

### 7 SHOW THE ROBOT AS A ROBOT.

Human likeness was the most common hurdle in our conversations. Campaigns could show the robot as what it is: a machine that helps.

# THINKING FURTHER …

**We suspect that some patterns from our conversations carry over to other technology. They give first hints about how people decide which technology gets into their lives.**

Whether AI assistant, smart home device, care app or customer service chatbot: anyone developing or advertising such products has to clarify which tasks the technology should take on – and where human interaction remains irreplaceable.

**Technology may ease the load. It shouldn't replace human closeness.** As soon as a product acts human, promises closeness or takes over decisions, the mood in our conversations often turned. This is already visible today: several respondents named AI therapists as a line, unprompted.

For product communication, this could mean: a strong lever is not only everything a product can do, but also what it deliberately doesn't do. Limitation may be one path to trust.

For communication on social issues, a number of questions arise that we humans need to settle among ourselves: How do we define the value of work when a person does it, and when a robot does it? Who gets paid, and how? What limits do we set for interaction with children, older people and those in need of care?

CHECKLIST

### SIX QUESTIONS FOR YOUR NEXT TECH CAMPAIGN

- Are we showing usefulness or a show?
- Are we promising relief or a relationship?
- Does our product add to people – or replace them?
- What does the path to trust look like?
- Which limits do we name ourselves?
- Does our product act more human than it is?

## "AI is sometimes already a friend."

AI ENTHUSIAST IN HIS SIXTIES – THE DISSENTING VOICE. THE LINE ISN'T THE SAME FOR EVERYONE, AND IT CAN SHIFT.

OUTLOOK

# OPEN QUESTIONS

**Every good field study ends with new questions. These are the ones we're taking into the next round.**

### SAME ABILITIES, DIFFERENT BODY?

Many weren't bothered by what the robot can do, but by what it looks like. Would they take it home without a human shape?

### ADD TO OR REPLACE?

A robot that helps is okay. One that replaces people isn't. But where exactly does it tip over? When does help become a replacement?

### TALK OR STAY SILENT?

We stumbled upon the question of whether a robot should talk by chance. It deserves more attention.

### IS A REMINDER ALREADY CARE?

Care by robots was only accepted in practical form, for example as a reminder to take tablets. Is that already care? Or just a tool?

### WHO WE STILL WANT TO HEAR FROM

Older people. They are often named as the target group for care robots, yet in our study they were almost only talked about, not asked. Also more children, carers, teachers and people who don't go to a tech fair by choice.

TO BE CONTINUED

## Do you have exciting industry insights, your own data or burning questions?

Write to us. We're happy to share what we've learned – and we work on learning something new every day.

**ABOUT US**

Tinkerbelle is a communications agency from Berlin and Cologne. Since 2008 we have been making campaigns for good things. We make complex things simple, uncomfortable things likeable and sustainability tangible. We ask questions and find out what your communication needs.

This white paper is based on interviews we conducted at IFA 2026 in Berlin. We're staying curious: this is the start of a series in which we explore topics like this, share what we find and feed the insights into our work.

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